

# **MIAMI BEACH LIGHT RAIL/MODERN STREETCAR**

## **EVALUATION COMMITTEE ORIENTATION MEETING**

**May 24, 2016**

# PROJECT DEFINITION





# Project Background

- **Many decades of studies have endorsed this project**
- **Most recently, 2015 – MPO Beach Corridor Transit Connection Study recommended advancing the project :**
  - Miami Beach Light Rail Circulator
  - Miami Light Rail Circulator
  - Causeway Connection
- **In December 2015 Miami Beach initiated the environmental review process for the Miami Beach Light Rail Circulator component of the regional program**

# Project Overview

- **City of Miami Beach developing/procuring Light Rail/Modern Streetcar system for people, businesses and attractions in South Beach**
- **The System will be of independent utility on Miami Beach and inter-operable with Beachline project across the MacArthur Causeway to Downtown Miami**
- **The LRT/Modern Streetcar will be catenary-free or off-wire technology (as defined more fully in the solicitation documents) operating on a dedicated right-of-way in the City of Miami Beach.**



# Project Definition

- **Preliminary Phase 1/  
Phase 2 alignment based on  
2015 Beach Corridor Transit  
Connection Study**
  - Alignment To be refined
  - Phases may be concurrent
- **Stations to be located every 2 to 4 blocks**
- **Vehicle Storage and  
Maintenance Facility site to be  
identified/provided by City**



# City Resiliency Program

- **The City of Miami Beach has adopted a Resiliency Program**
- **Various projects are active under the Resiliency Program**
- **LRT/Modern Streetcar P3 Program will fall within the Resiliency Program parameters**
- **Concessionaire's scope may include upgrading streets to meet the Resiliency Program requirements (to be funded separately by the City)**





# Technical Project Team

- **Kimley Horn Team**
  - **Technical Support Team**
    - Kimley-Horn
    - HDR
    - WSP – Parson Brinckerhoff
    - LTK
  - **P3 Financial Support Team**
    - Clary Consulting
    - Castalia Advisors
  - **Public Involvement**
    - Media Resources Group
    - Kommunikatz
- **Outside Legal Counsel**
  - Nossaman LLP

# **PROJECT SCHEDULE CONCURRENT ENVIRONMENTAL REVIEW**



# Environmental Review

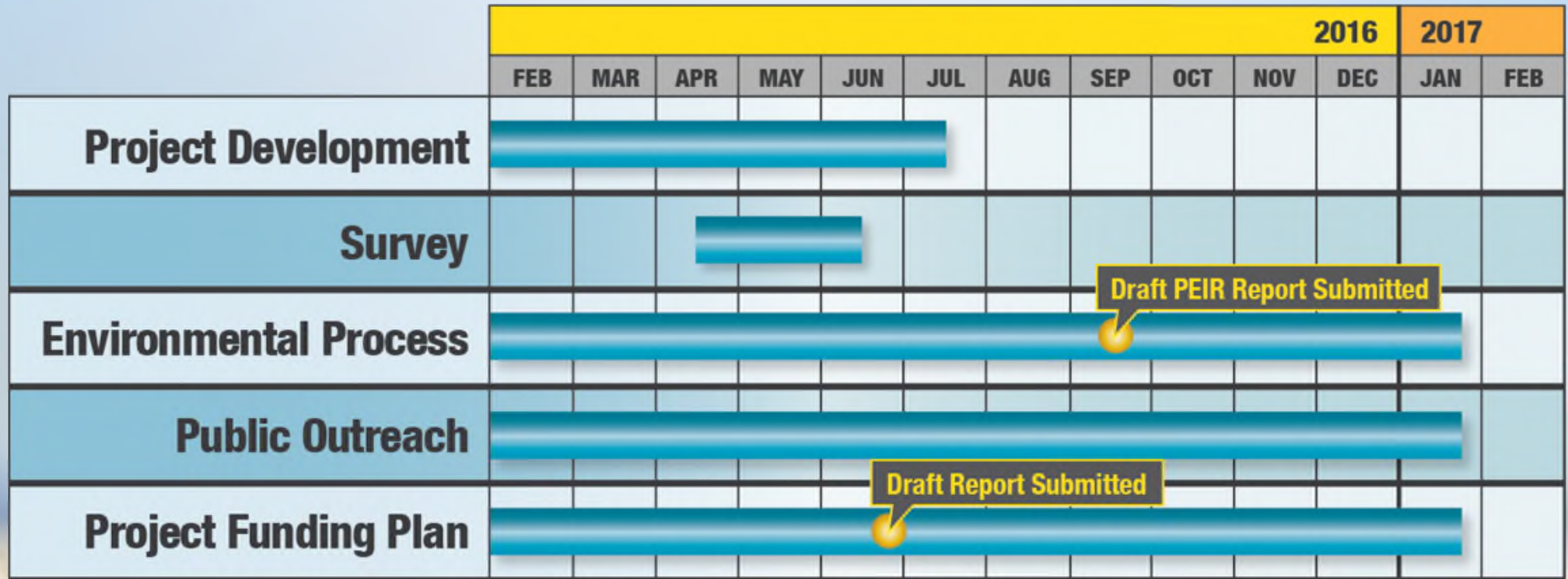
- **City of Miami Beach is completing the Environmental Process in parallel to the Procurement**
- **Draft Environmental Report will be complete in September 2016 and the Final Report expected to be completed in early 2017**
- **Primary issues expected to be historic resources, resiliency, traffic, noise and construction impacts**

# Project Funding Plan

- **The initial draft Project Funding Plan will be presented at the Finance and Citywide Projects Committee Budget Briefing June 6**
- **The Funding Plan will be refined and presented to the Commission July 13 concurrent with the Manager's report on ranking the Proposals**
- **An action plan will be presented to implement the Funding Plan concurrent with the procurement by early 2017**



# Environmental Review Project Schedule



# PROCUREMENT REQUIREMENTS



# Start of Procurement

- **June 2015 - Miami Beach received unsolicited proposal to design, build, finance, operate and maintain an off-wire LRT/streetcar as a Public Private Partnership (P3)**
- **January 2016 – City issued notice for alternative proposals pursuant to state statute, in parallel with environmental analysis**
- **March 2016- City issued Amended and Restated Proposal Requirements Document (PRD)**
- **May 10 – Proposal responses were due**

# Procurement Process

## Procurement in accordance with Section 287.0512, Florida Statutes

### Two Phase Process

- **Phase 1 – Minimum Requirements, Qualifications and General Approach to the Project**
  - Details are included in PRD and summarized in following slides
  - Evaluation and Ranking of Proposals in Order of Preference
- **Phase 2 – Negotiation of Interim and Comprehensive Agreements**
  - Project Definition and Technical Details
  - Firm Price and Financial Plan



# **PROCUREMENT PROCESS PHASE 1**

# Minimum Requirements

## **A. Technology and Lead Contractor Requirements:**

1. Demonstrated capacity of fully catenaryless revenue operations in Miami Beach with alignment on dedicated right of way
  - the Vehicle/System Technology may use catenary within the maintenance facility depot, and allow for charging of the vehicle batteries or supercapacitors at passenger stops along the route
2. Demonstrated full performance capabilities including air conditioning in vehicles for climate similar to Miami Beach
3. Demonstrated capacity may be satisfied if the proposed Vehicle/Systems Technology is in revenue operation as part of any portion or segment of track within any project anywhere in the world



# Minimum Requirements

4. Technology must include low floor, low step design throughout each vehicle to maximize and facilitate accessibility and more timely passenger loading and unloading
5. Able to operate in a typical centenary system in the United States (750V DC)
6. Demonstrated capacity to address minimum ridership of 20,075 people on a daily basis

# Minimum Requirements

7. Proposer's Lead Contractor Bonding capacity of not less than \$300 million.
  - Letter of bonding capacity from an A-rated, Financial Class V, Surety Company
8. Successfully delivered a design/build or other form of construction contract, at least (1) public or public/private infrastructure project of at least \$250 million in the last (5) five years
9. The Lead Investor must have successfully delivered financing for a project under a public-private partnership (P3) approach within the last ten years by Lead Investor for a P3 project of at least \$400 million.



# Procurement Process

## Other Considerations:

- **Application Fee in the amount of \$100,000, payable to the City of Miami Beach**
- **For purposes of the Minimum Requirements, “Buy America” provisions of the U.S. Department of Transportation, set forth in 49 C.F.R. 661 and other provisions of federal law, shall not apply to the Project**
- **Vehicle/System suppliers may participate on more than one team**
- **Other Lead Team Participants limited to one Proposer team**

# Lead Team Participants

- **Lead Contractor:** Firm responsible for construction of the Project
- **Lead Operator:** Firm responsible for operation of vehicle/streetcar system
- **Lead Engineer:** Firm primarily responsible for completion of all Project-related engineering
- **Lead Maintenance Entity:** Firm responsible for maintenance of Project
- **Lead Investor:** Entity primarily responsible for providing equity for the Project
- **Vehicle/Systems Suppliers:** The streetcar vehicle or systems technology suppliers



# Procurement Process

## Proposal Evaluation will follow the following steps:

- Step 1: All Proposals will be reviewed by City for Responsiveness (including Minimum Requirements)
- **Step 2: The Evaluation Committee will provide a recommended ranking to the City Manager**
- Step 3: The City Manager will review the Evaluation Committee's advisory recommendations in making his own recommendation to the City Commission
- Step 4: City Commission will approve final rankings and, at its discretion, authorize negotiations for an interim agreement with the top-ranking firm. In the event negotiations are unsuccessful, City to initiate negotiations with the second-ranked firm.

# EVALUATION PROCESS



# Evaluation Process

**The Evaluation Committee shall meet to evaluate each response and rank Proposers in order of preference and based on consideration of the professional qualifications of the Proposers (including each of the Lead Team Participants), and the following factors:, in no particular order:**

- Compliance with the Minimum Requirements (Tab 1 of Proposals);
- Experience and Qualifications of Proposer and each of the Lead Team Participants (Tab 2 of Proposals);
- Financial capability of the Proposer (Tab 3 of Proposals); and
- Proposer's Approach and Methodology (Tab 4 of Proposals)

# Evaluation Process

- **Experience and Qualifications of Proposer and each of the Lead Team Participants, including consideration of the information requested in Tab 2 of Section 0300 of the PRD**
  - a. **Company Information:** history/organizational structure, years in business, number of employees, and the like
  - b. **Experience and Qualifications on Other Infrastructure Projects.** Experience with comparable design-build, design-build-operate-maintain, or other public or public-private infrastructure projects of size and scope similar to or larger than the Project.

Committee to consider type of project, scope of project, years the Project was constructed, hard construction costs for the project or operating/maintenance budget for the project (as applicable), and delivery approach or method.

For Lead Investor and Contractor, Committee to consider record of projects completed within the contract time and contract price (including capital costs per vehicle and mile, and operating costs per revenue mile).



# Evaluation Process

- **Experience and Qualifications of Proposer and each of the Lead Team Participants – Tab 2 (continued)**
- c. **Experience and Qualifications on Rail or Transit Projects With Emphasis on Streetcars in Urban Settings.** Proposer's and each Lead Team Participant's experience with similar rail or transit projects with emphasis on streetcar projects in urban or sensitive environmental areas and community areas of comparable size and scope
  - type of project, scope of project, years constructed, hard costs, and delivery approach or method (including capital costs per vehicle and mile, and operating costs per revenue mile)
  - key personnel who worked on each project who will work on this Project
  - experience in managing the maintenance of traffic, roadway (or bridge) design and construction, environmental and other permitting, and implementing community relations and outreach programs on projects of similar size and complexity to this Project
  - Lead Engineer's completion of at least one or more transit facility comparable to the Project

# Evaluation Process

- **Experience and Qualifications of Proposer and each of the Lead Team Participants – Tab 2 (continued)**

d. **Capacity to Manage and Implement the Project.** Provide additional information sufficient to identify Proposer's and each Lead Team Participant's demonstrated capacity to manage and implement projects of \$250 million or larger.

e. **Prior Working Relationships Between and Among Team**

**Members:** prior working relationships between or among Proposer or Lead Team Participants based on type of project, project scope, years constructed, hard costs, and delivery approach or method, including key personnel who will also work on this Project



# Evaluation Process

- **Experience and Qualifications of Proposer and each of the Lead Team Participants – Tab 2 (continued)**

f. **Key Personnel and Level of Commitment.** References, years of experience, areas of expertise, and list of prior projects comparable in size and scope (or greater) of this Project for key personnel. Key Personnel (at a minimum) shall include:

- Project Manager
- Construction Manager
- Construction Superintendent
- Design Manager
- Lead Design Engineer
- Independent Quality Manager
- Design Quality Manager

All key personnel will be required to be on-site 100% of the time during activities that involve their areas of responsibility. Substitution of Key Personnel will be subject to review and acceptance by the City.

# Evaluation Process

## **Experience and Qualifications of Proposer and each of the Lead Team Participants – Tab 2 (continued)**

g. Prime Constructor Safety Record. Experience Modification Rate (EMR) and OSHA forms 300 and 300A for the past three (3) years.

## **Financial capability of the Proposer – Tab 3**

- **Financial capacity of Proposer and Lead Team Participants** and financial guarantors based on Proposer's, Lead Investor's, financial guarantors, Lead Contractor, Lead Operator and Lead Maintenance most recent annual reviewed/audited financial statement with the auditors' notes

**City Advisor to provide Committee with technical report, including with respect to financial capacity**



# Evaluation Process

## **Proposer's Approach and Methodology, including consideration of the information requested in Tab 4 of Section 0300 of the PRD**

**1. Management and Organization:** the approach and methodology in accomplishing the following goals of this Project

- i. an understanding of and approach to the management, technical aspects, maintenance of traffic (and related access to residential and business areas), and risks associated with the Project
- ii. an understanding of and approach to how the public-private partnership, or "P3", process and the Proposer's organization will contribute to the success of the Project and meet the City of Miami Beach's Project goals; and
- iii. an understanding of the risk sharing and the teaming relationship between the Proposer and the City of Miami Beach.

# Evaluation Process

**Proposer's Approach and Methodology, including consideration of the information requested in Tab 4 of Section 0300 of the PRD.**

a. Methodology for integrating the Proposer and Lead Team Participants and their respective areas of expertise: methodology for integrating the Proposer and the different areas of expertise of Lead Team Participants into an efficient and effective organization

b. Management Approach: The management approach and understanding of the use of the P3 project delivery methodology for transportation projects





# Evaluation Process

## **Proposer's Approach and Methodology, including consideration of the information requested in Tab 4 of Section 0300 of the PRD**

c. Organization Chart: "chain of command," approach for major functions to be performed, and their reporting relationships, in managing, designing, and building the Project, the functional structure of the organization down to the design discipline leader or construction superintendent level and Key Personnel by name. Lead Team Participants in the chart(s), critical support elements and relationships of Project management, Project administration, construction management, quality control, safety, environmental compliance, and subcontractor administration.

d. Organizational Chart Functional Relationships: how the proposed organization will function as an integrated team.

# Evaluation Process

**Proposer's Approach and Methodology, including consideration of the information requested in Tab 4 of Section 0300 of the PRD**

**2.Approach to P3/Design-Build-Operate-Maintain-Finance.** Sample approach to finance the Project assuming an availability payment approach that is supported by annual payments during the operation period subject to annual appropriation. Lead Investor's financial capacity to guarantee an equity contribution of at least \$50 million for the Project

Identification of potential financing options/sources of funding to finance the Project over a long-term availability payment period





# Evaluation Process

**Proposer's Approach and Methodology, including consideration of the information requested in Tab 4 of Section 0300 of the PRD**

**3. Approach to Design and Construction.** Demonstration of an understanding of and sound approach to the development, design and construction of the Project

a. How Proposer will incorporate innovative design and other techniques in the Project through the lifecycle of the Project

b. Approach to plan, organize, and execute the design and construction of, and assure the quality and safety of the Project simultaneously



# Evaluation Process

**Proposer's Approach and Methodology, including consideration of the information requested in Tab 4 of Section 0300 of the PRD**

## **3. Approach to Design and Construction.** (continued)

c. Approach to effectively manage all aspects of the Contract in a quality, timely, and effective manner and integrate the different parts of its organization with the City of Miami Beach in a cohesive and seamless manner

d. Approach to implementing the Project and other potential additional routes (i.e. 17<sup>th</sup> Street, Alton Road, Dade Boulevard, Meridian Avenue or Convention Center Drive), in terms of schedule (including timeframes for developing a comprehensive agreement following execution of interim agreement, and timeframes for commencement of revenue operations following execution of comprehensive agreement), maintenance of traffic, design, and construction, and how Proposer would approach the Project if both phases were to proceed simultaneously.



# Evaluation Process

**Proposer's Approach and Methodology, including consideration of the information requested in Tab 4 of Section 0300 of the PRD**

## **4. Approach to Implementation in Complex Urban Environments**

- a. Proposer's general approach to integrating the City and identified stakeholders in the various phases of the Project
- b. Proposer's general approach to traffic management, utility identification and relocation, access during construction, pedestrian and parking accommodation, and community outreach
- c. Proposer's anticipated operating approach for the Project

# Evaluation Process

**Proposer's Approach and Methodology, including consideration of the information requested in Tab 4 of Section 0300 of the PRD**

## **5. Approach to Vehicle Systems Technology**

- a. Proposed vehicles
- b. Operations and maintenance for the Proposer's Vehicle/Systems Technology, including site requirements
- c. Provide service history for the Vehicle/Systems Technology, including vehicles; and
- d. [Section 5(d) of proposal instructions inadvertently left blank]
- e. How the Proposer's Vehicle/Systems Technology will be interoperable with the Direct Connect Project
  - Ability for vehicles from City project to operate with causeway project
  - How an alternate vehicle technology may be integrated to permit it to operate wirelessly on Proposers tracks in Miami Beach if an alternate technology is selected for the portion of the project over the McArthur Causeway



# Evaluation Process

**Proposer's Approach and Methodology, including consideration of the information requested in Tab 4 of Section 0300 of the PRD**

## **5. Approach to Vehicle Systems Technology** (continued)

- f. **Estimated schedule** with timeframes for delivery of the Vehicles/Systems Technology for the Project, including timeframes for the delivery of the vehicle
- including demonstrated delivery of comparable vehicles within the timeframes proposed in the sample schedule,
  - the actual vehicle delivery time periods for Vehicle/Systems Supplier's projects in the last five years that meet the Minimum Requirements for each such project, with the time periods measured from execution of the project agreement to delivery to each project site

# Evaluation Process

**Proposer's Approach and Methodology, including consideration of the information requested in Tab 4 of Section 0300 of the PRD**

## **5. Approach to Vehicle Systems Technology** (continued)

- g. How the Vehicle/Systems Technology will function or operate continuously, in areas prone to flooding** and if not under what conditions must the service be suspended such as specific "level of water", water type (fresh water from rain compared to salt water) how long the water will be in place, etc.
- h. How the Vehicle/Systems will be charged, including, if applicable, how vehicle batteries or supercapacitors will be charged at passenger stops** along the project route and Proposer's approach to ensuring that the application of the power supply is unobtrusive and incorporated within the architectural features of the design for the passenger stops.



# Evaluation Process

**Proposer's Approach and Methodology, including consideration of the information requested in Tab 4 of Section 0300 of the PRD**

## **6. Approach to Process for Developing Comprehensive Agreement**

- Estimated schedule for pre-development activities pursuant to an interim agreement, including a schedule for providing a final, firm price and for negotiation of a comprehensive agreement or the Project
- Information and commitments required from the City in order to meet the proposed schedule
- Schedule and approach for achieving financial close after execution of the comprehensive agreement
- Financial commitments or obligations required from the City as part of the Interim Agreement and/or prior to execution of the comprehensive agreement and financial close, including items required by the proposer should the City decide to terminate the process and not proceed to a comprehensive agreement

# City's Advisor Report

- **The City tasked the Kimley-Horn and Nossaman teams to review the proposals for due diligence and to provide a technical report to the Evaluation Committee**
- **The due diligence will focus on verifying information included in the Proposals**
- **Advisor's Report on the Proposals will be provided June 10**



# Evaluation Process

**Rankings shall be based on each Committee Member's fair and honest assessment of:**

- **The contents of each proposal, including responses to Tabs 1-4 re: minimum requirements, qualifications and experience, financial capacity, and approach and methodology;**
- **The City Advisor's technical report to be provided to the Committee;**
- **Oral presentations/Q&A (based on information set forth in the proposals);**
- **Following oral presentations, Committee Members will discuss their individual evaluations. At the conclusion of the Committee's deliberations, members shall individually rank proposals in order of preference.**
- **No one factor is assigned any greater weight than any other factor**

# Procurement Official Contact

**Cone of Silence applies – all contacts to:**

- **Kristy Bada, City of Miami Beach Procurement Department**
  - 305-673-7490
  - [KristyBada@MiamiBeachFL.gov](mailto:KristyBada@MiamiBeachFL.gov)
- **Copy to: [RafaelGranado@miamibeachfl.gov](mailto:RafaelGranado@miamibeachfl.gov) or via Fax 786-394-4188 (Clerk, City of Miami Beach)**



# DO's and DON'Ts

## Evaluation Committee Members

- **DON'T** discuss, outside of the Evaluation Committee meeting, proposers or their proposals *with anyone, including other Committee members*, other than the Procurement officer or City Attorney's Office.
- **DON'T** discuss any matter regarding the solicitation with proposers. To do so is a violation of the Cone of Silence ordinance and will result in respondent's proposal being rejected.
- **DON'T** participate on the Evaluation Committee if you believe a conflict or potential conflict of interest may exist. Please address any concerns with the City Attorney's Office prior to the Evaluation Committee meeting.
- **DON'T** consider any criteria differing from or in addition to the proposal packages provided to you by Procurement.
- **DON'T** be late or miss any meetings. Doing so may jeopardize the process and the City Commission's requested timeline for approvals.
- **DON'T** procrastinate on the review of proposals. Be prepared to discuss your evaluations with the committee. Whenever possible, resist awarding tie scores.

# DO's and DON'Ts


## Evaluation Committee Members

- **DO** contact the contracting officer, Procurement Department or City Attorney's Office for any questions regarding the solicitation process, including questions regarding meetings, regulatory compliance, or other questions you may have.
- **DO** refer any proposer that contacts you immediately to the contracting officer or Procurement Department.
- **DO** disclose, through the City's Conflict of Interest Form, any conflict or potential conflict of interest you may have regarding any respondent to the solicitation.
- **DO** carefully evaluate all proposals in accordance with the established criteria only.
- **DO** arrive punctually to all meetings. Failure to do so may jeopardize the process or disqualify you from participating as an evaluation committee member on the project.
- **DO** complete your initial review of proposals prior to arriving at the evaluation so that you are prepared to ask questions and deliberate with other committee members during the public evaluation meeting.
- **DO** understand that competitive solicitations are subject to the City Code, the Florida Public Records Act, and other Florida statutes, including the Sunshine Law. The evaluation committee meetings will be recorded.



# Proposals

- **Three proposals were received on May 10**
- **All three proposals are ready for the Evaluation Committee's review**
- **The proposals are confidential and exempt from public records disclosure in their entirety until June 9, 2016 and may not be disclosed or shared outside of your review.**
- **Proposer's financial statements are confidential and exempt from disclosure *at all times* pursuant to Fla. Stat. 119.071(1)(b)4.**



# **Q&A**

## **Please Focus on the Project and Procurement Process**